

CRED

Columbia Research Enhanced Real Estate ETF Analyst Report

CRED tracks an index comprised of US REITs. The strategy is based on a multi-factor criteria evaluated by Columbia Threadneedle and Lionstone Investments.

ESG Themes and Scores

6.71/10

ESG Rate

56.5%

Global Percentile

84.24%

Peer Percentile

Performance Data

	CRED	ETF Database Category Average	Factset Segment Average
1 Month	1.47%	0.31%	1.48%
3 Month	3.93%	2.52%	3.50%
YTD Return	14.05%	10.16%	9.33%
1 Year Return	10.38%	11.65%	9.31%
3 Year Return	9.44%	8.09%	5.88%
5 Year Return	N/A	1.68%	1.56%

Top 5 Holdings

Symbol	Holding	% Assets
PLD	Prologis, Inc.	12.44%
EQIX	Equinix, Inc.	10.03%
SPG	Simon Property Group, Inc.	8.26%
AMT	American Tower Corporation	8.09%
DLR	Digital Realty Trust, Inc.	5.99%

Vitals

Issuer	Ameriprise Financial
Brand	Columbia
Structure	ETF
Expense Ratio	0.33%
Inception	Apr 26, 2023
Index Tracked	Beta Advantage Research Enhanced REIT Index - Benchmark TR Gross

ETF Database Themes

Category	Real Estate
Asset Class	Real Estate
Asset Class Size	Mid-Cap
Asset Class Style	Blend
Region (General)	North America
Region (Specific)	U.S.

FactSet Classifications

Segment	Equity: U.S. REITs
Category	Sector
Focus	Real Estate
Niche	REITs
Strategy	Multi-factor
Weighting Scheme	Multi-Factor

